Electronic Document Access (EDA)

EDA

EDM/EFR Documents and

“Fly-in” Action

(Continue to Page Down/Click on each page…)

EDM/EFR Documents within EDA

Electronic Document Management (EDM) facilitates the consolidation of DoD finance and accounting functions for DFAS. The Electronic File Room (EFR) system was established to provide electronic foldering, distribution, cataloging, and maintenance of the large amounts and diverse types of Contract and Vendor payment related documentation to the DoD community.

EFR is a web-based application that provides authorized DoD users view only access to DFAS EDM documents. DFAS EDM documents include: all the EDM vendor and contract pay related documents.

EDM/EFR and User Authorization

EFR utilizes EDA's delegated *User Authorization* structure and process. This allows the EB POCs to determine if their users require access to Contract Pay and/or Vendor Pay EDM documents. The EB POC follows normal EDA access policies and C/S/A guidelines when granting EDM/EFR document access. The same guidelines for granting access to EDA contracts should be followed for access to EDM documents.

Contract Pay and/or Vendor Pay may be requested within EDA. Upon EB POC approval and EDM/EFR credential set-up, EDA presents a link to **EDM/EFR Documents** on the Document Selection Screen.

EDM/EFR Access Process

The user requires a separate username/password to access EFR since EDM/EFR is a separate system and access credentials are not integrated with EDA.

An additional user account set-up is required for each user requesting EDM Contract Pay and/or Vendor Pay Documents which is performed by the EDM/EFR Help Desk.

Let's Take a Closer look at the Steps and see what happens…

Step 1- EDM Access Process

Step 1: EB POC Approves the EDA registration requesting EDM/EFR Documents (Contract Pay and/or Vendor Pay) or modifies an existing account indicating the new Contract Pay and/or Vendor Pay roles.

EDA performs the following upon approval:

- *Creates* an EDA user account without the EDM Document Access. The User can access EDA and view other requested document types available within EDA.
- *Creates* an EDM request within Account Administration.
- *Sends* an e-mail notification to trigger the EDM/EFR Help Desk to establish EFR username(s)/password(s) for the requestor and processes the request within EDA.

Step 2…

EDM/EFR Access Process

Step 2: The EDM/EFR Help Desk services the EDA generated EDM request.

EDM/EFR performs the following functions:

- *Evaluates* the request according to its business rules and creates the necessary EFR account(s) for access into EFR on EB POC approved users.
- *Contacts* the user and *distributes* the EFR username(s)/password(s) access credentials.

Step 3…

EDM/EFR Access Process

Step 3: EDM/EFR Help Desk logs into EDA and accesses Account Administration function and processes (approves or deletes) the EDM/EFR requests.

EDA performs the following functions:

- Upon approval, *updates* the EDA User Account to include the Contract Pay or Vendor Pay role.
- *Deletes* the EDM access request from queue

EDM/EFR Access Process

EDA users with the EDM Contract Pay and/or Vendor Pay role will be presented with the EDM/EFR Document link on EDA's Document Selection Screen which *redirects* the user to the EDM/EFR system. Link takes the user to the front page of the EFR system where the user is prompted for EFR credentials (separate Username/Password).

EFR is not part of EDA, it is a DFAS owned and operated system. All issues with EFR access should be redirected to the EDM/EFR Help Desk at cco.edm-helpdesk@dfas.mil.

Another way to look at the process…

EDM/EFR Access Process

NEW USER Process…

1. **User** *Registers* in EDA and enters: Contract Pay & Site information and/or Vendor Pay & Site info

2. **EDA** *Notifies* assigned EB POC of Registration Activity by e-mail which includes process instructions

3. **EB POC** Opens e-mail
   - Contacts User
   - Verify Request
   - Validate Access

Identity Check & Need to Know??

4. Perform Account Administration to process Registration

Enter EDA

Log on

EB POC Approval Process

THE Approval Process…

1. New **EB POC** *Approves* registration. EB POC must answer 'auditor' question for EDM/EFR access

Log on

Enter EDA

2. New New **EDA**
   - *Builds* EDM/EFR Request record
   - *Sends* notification to EDM/EFR Help Desk
   - *Adds* User to EDA & allows EDA access
   - *Audits* access & test activities

3. New **EDM/EFR Help Desk** Opens e-mail
   - **Contacts User/EB POC**
   - **Verify Request**
   - **Validate Access**

4. New Perform Account Administration to process EDM/EFR Access Request

EDM/EFR Set-up Process

THE Approval of EDM/EFR…

1. **EDM/EFR Help Desk**
   Approves/Deletes Contract Pay or Vendor Pay Access requests in EDA.

2. ***EDA***
   - *Audits* EDM/EFR access
   - If *Approved* - *Grants* roles to User

   (user sees EDM/EFR Document link on document selection)

3. **EDM/EFR Help Desk**
   - **Distributes EDM/EFR Username/Password**
   - **Assists User as requ**

4. **User Logs into EDA with EDA Username/Password**

   User Clicks EDM/EFR Documents link
   EDA *Redirects* to EDM/EFR Web Page

   User Logs into EDM/EFR
   With EDM/EFR Username/Password

Modify Existing User Access

To Modify an existing User…

1. **EB POC** *Initiates* change to user Account. EB POC must answer 'auditor' question for access

New

EDA

2. • *Builds* EDM/EFR Request record
• *Sends* notification to EDM/EFR Help Desk
• *Adds* User to EDA & allows access
• *Audits* access activities

New

New

Log on

Enter EDA

3 New **EDM/EFR Help Desk** opens e-mail

- **Contacts User/EB POC**
- **Verify Request**
- **Validate Access**

4. New Perform Account Administration to process EDM/EFR Access Request

Roles & Access Control

A new EDM/EFR Help Desk role with responsibilities has been established within EDA to administer EDM/EFR access requests

- **Access is restricted to EDM/EFR Request queue only**
  - Reserved for personnel of the EDM/EFR Help Desk
  - Access to service requests from ALL C/S/A communities
  - Requires DD Form 2875 to be submitted to EDA Help Desk in Ogden
- **Responsibilities include:**
  - Servicing EDM Requests (EDA's EB POC approval process generates EDM Requests) within EDA for all communities in a timely manner (2-4 business days).
  - Establishing and distributing EFR username(s)/password(s) access credentials to users
  - Communicates with EB POCs as necessary if changes to EFR access status occurs
  - Respond to the user community – password resets/access
  - Communicates to the EDA Help Desk/Program Office issues/problems/availability of the EFR system

Administration Responsibilit

SERVICE EDM/EFR Requests…

- ☑ EDM/EFR Requests

EDA notifies the ***EDM/EFR Help Desk*** by e-mail when EDM/EFR account administration activity occurs. The e-mail will indicate Contract Pay (includes site information) and/or Vendor Pay (includes site information), basic user information, and EB POC contact information.

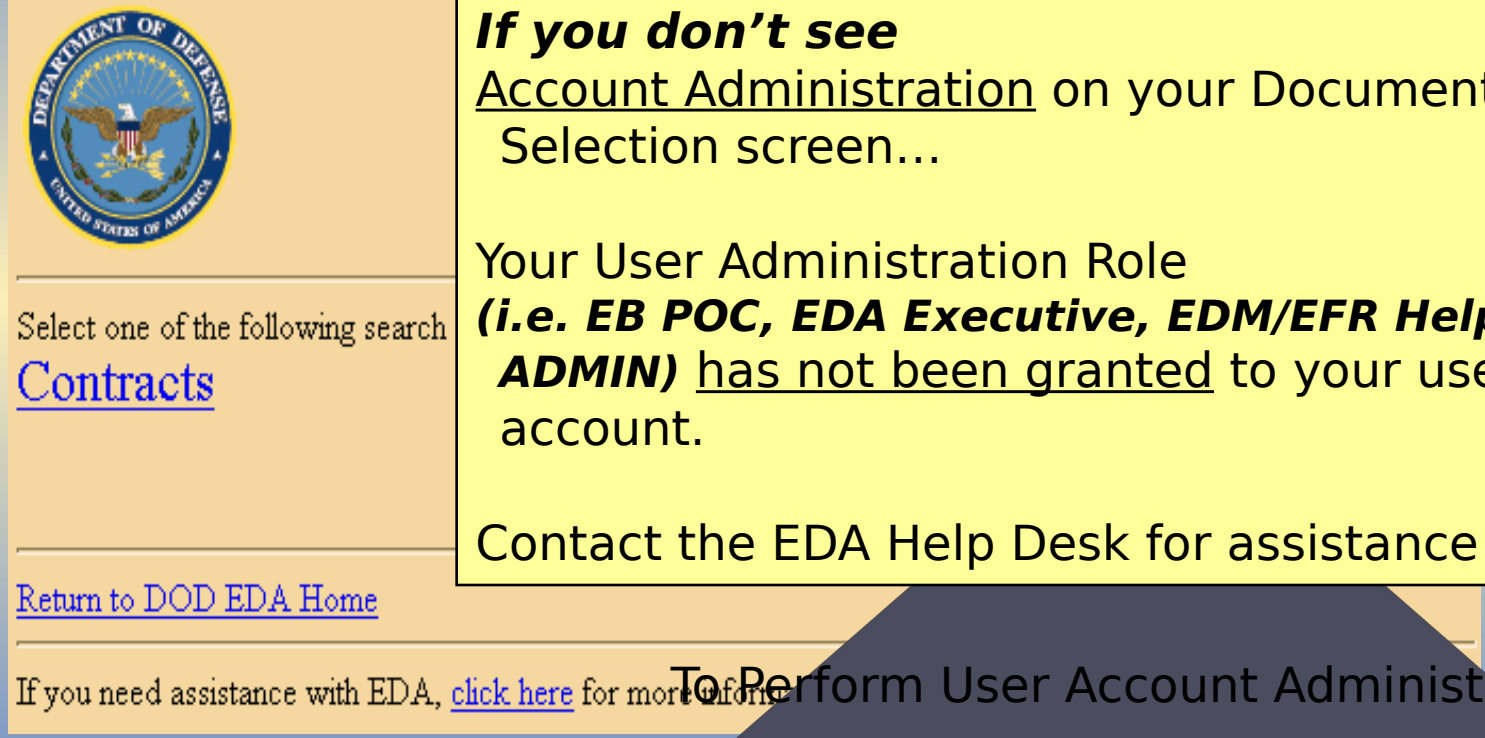
User Account Administration

To Support your Requests…

- Log into EDA
- Click Account Administration

Let's Take a Closer LOOK…

Entering Account Administratio


Select one of the following search
Contracts
Return to DOD EDA Home
If you need assistance with EDA, click here for more inform

If you don't see
Account Administration on your Document Selection screen…

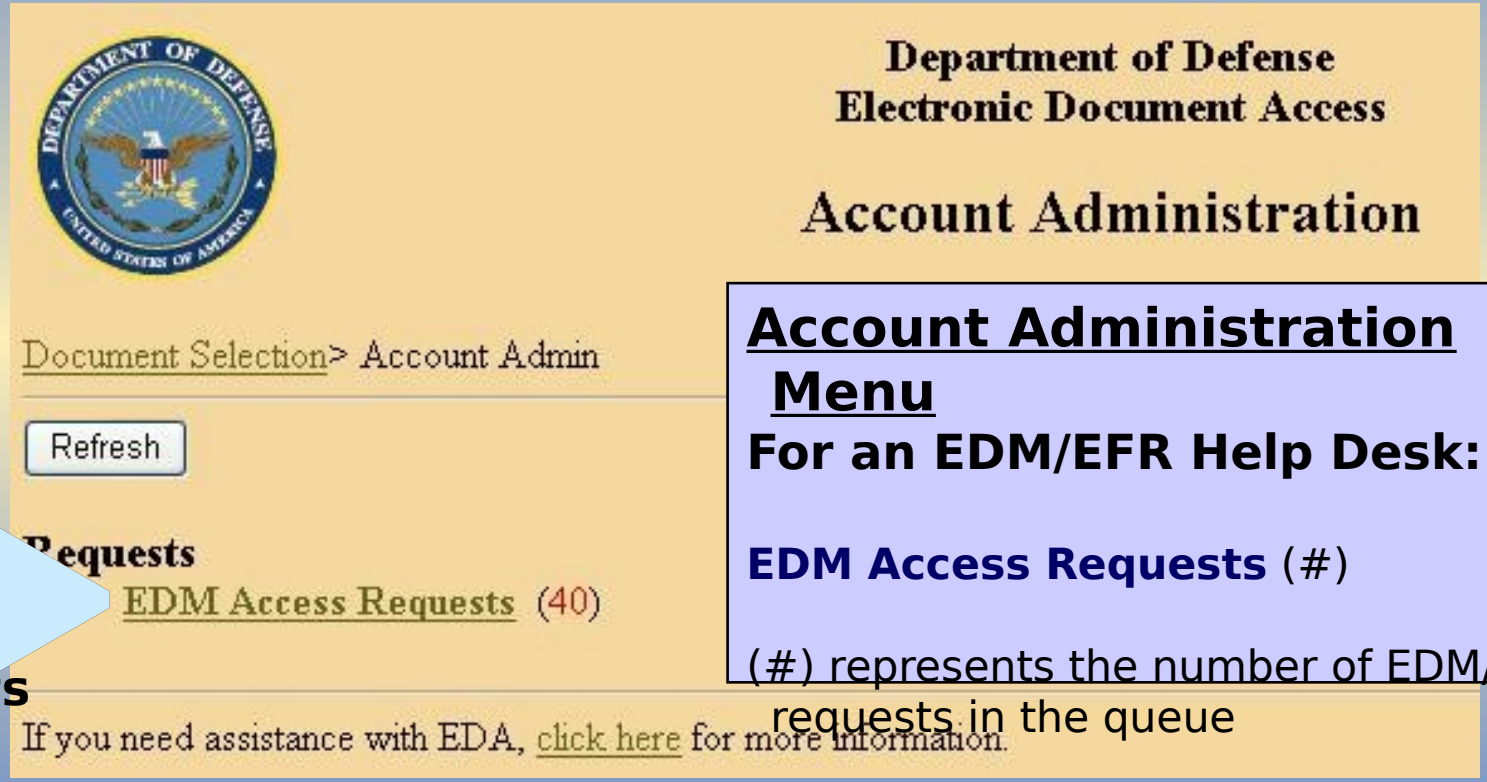
Your User Administration Role ***(i.e. EB POC, EDA Executive, EDM/EFR Help Desk*** or ***ADMIN)*** has not been granted to your user account.

Contact the EDA Help Desk for assistance

To Perform User Account Administration

CLICK
"Account Administration"
on the Document Selection Screen within EDA

Account Administration Menu



Click **EDM Access Requests**

Account Administration Menu

For an EDM/EFR Help Desk:

EDM Access Requests (#)

(#) represents the number of EDM/EFR requests in the queue

Let's Take a Closer LOOK…

EDM/EFR Request Queue

Document Selection> Account Admin> EDM Access Requests

General Navigation

Total Requests: 15

Total EDM Requests in Queue for ALL C/S/As

Refresh

EDM queue
Alphabetical
Order By
Last Name

		Name	Submitted	CSA	Telephone	E-mail	Auditor	Access To	Sites
Approve	Delete	Broderick, Smokey	June 28, 2004	DFAS	703-904-3614	terry.broderick@eds.com	No	Vendor Pay	
Approve	Delete	Broderick, Smokey	June 28, 2004	DFAS	703-904-3614	terry.broderick@eds.com	No	Contract Pay	
Approve	Delete	Edmboth, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	No	Contract Pay	
Approve	Delete	Edmboth, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	No	Vendor Pay	
Approve	Delete	Edmcontractl, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	Yes	Pay	11111111112
Approve	Delete	Edmcontractl, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com			
Approve	Delete	edmdelete, edm	July 02, 2004	DFAS	808088				
Approve	Delete	Edmvendor, Govie	July 02, 2004	DFAS	90909	terry.br			
Approve	Delete	Jones, Steven	July 06, 2004	US Air Force	3456789	stev			
Approve	Delete	Smith, Doug EDM 2	July 02, 2004	Vendor Pay	555-4321	doy			

Click **Approve**

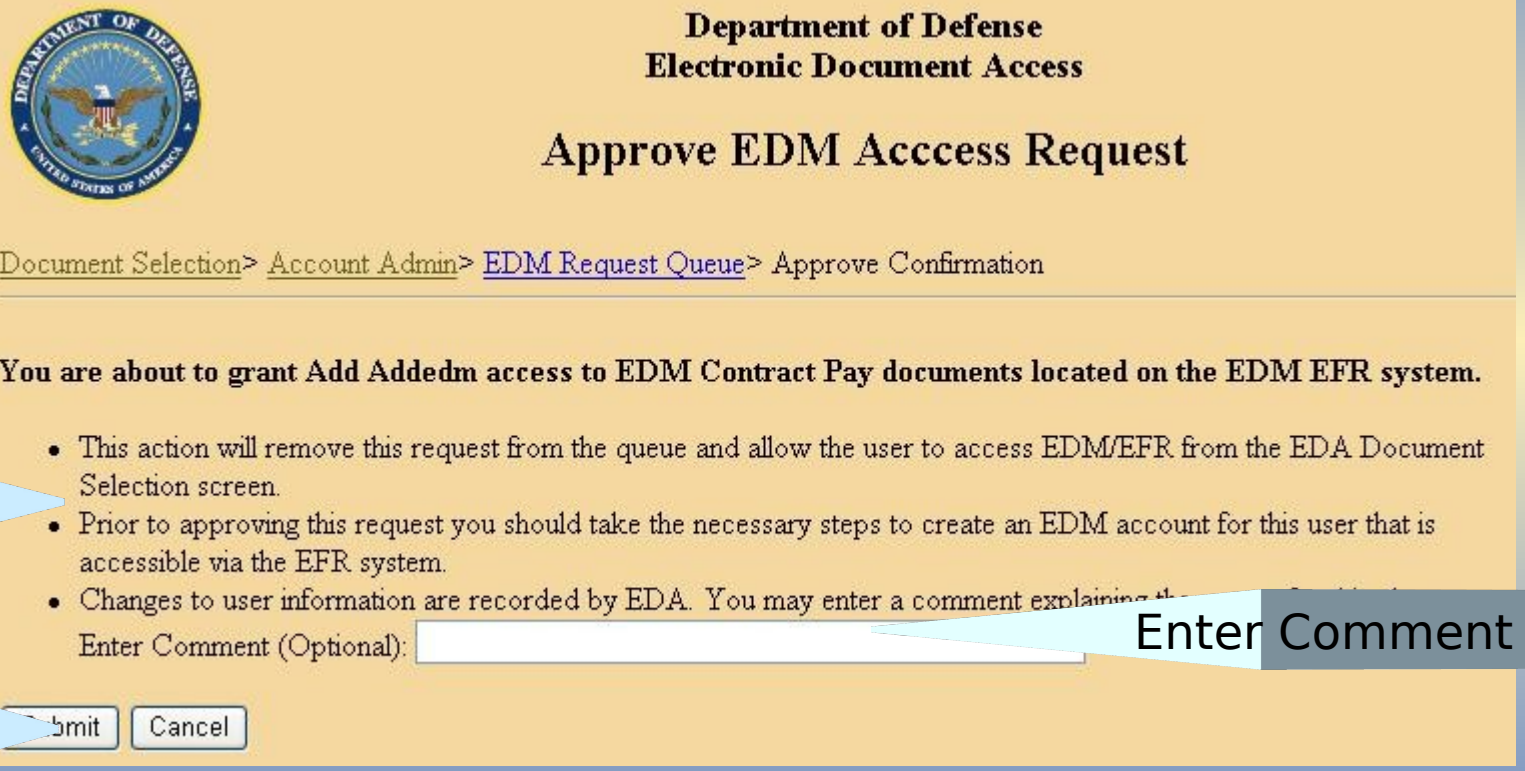
One Request per Role per User

Contract Pay request
Vendor Pay request

Queue may be re-sorted by column.
Click column heading to re-sort queue.

Action is required by the EDM Help Desk for each request in queue.

Approve EDM/EFR Request


Department of Defense
Electronic Document Access
Approve EDM Acccess Request
Document Selection> Account Admin> EDM Request Queue> Approve Confirmation
You are about to grant Add Addedm access to EDM Contract Pay documents located on the EDM EFR system.
This action will remove this request from the queue and allow the user to access EDM/EFR from the EDA Document Selection screen.
Prior to approving this request you should take the necessary steps to create an EDM account for this user that is accessible via the EFR system.
Changes to user information are recorded by EDA. You may enter a comment explaining
Enter Comment (Optional):
bmit
Cancel

Important Info

Enter Comment (optiona

Click **Submit**

Approved Contract Pay Complete …

After Approval, User Sees

EDA updates the User Account and indicates Contract Pay and/or Vendor Pay roles.

Dep
Electr

Document Selection Screen

Account Administration
My Profile....
EDM/EFR Documents

Users having either *Contract Pay* or *Vendor Pay* roles are presented the EDM/EFR Documents link on the EDA Document Selection Screen.

The EDM/EFR Document link REDIRECTS the user to the front page of the EFR system where the user will be prompted for their EFR access credentials.

Next…to Delete an EDM/EFR Request

Delete EDM/EFR Request

Document Selection> Account Admin> EDM Access Requests

Total Requests: 15

Refresh

Action	Name	Submitted	CSA	Telephone	E-mail	Auditor	Access To	Sites
Approve Delete	Broderick, Smokey	June 28, 2004	DFAS	703-904-3614	terry.broderick@eds.com	No	Vendor Pay	
Approve Delete	Broderick, Smokey	June 28, 2004	DFAS	703-904-3614	terry.broderick@eds.com	No	Contract Pay	
Approve Delete	Edmboth, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	No	Contract Pay	
Approve Delete	Edmboth, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	No	Vendor Pay	
Approve Delete	Edmcontractl, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	Yes	Contract Pay	11111111112
Approve Delete	Edmcontractl, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	Yes	Vendor Pay	
Approve Delete	edmdelete, edm	July 02, 2004	DFAS	808088	terry.broderick@eds.com	Yes	Contract Pay	North, West
Approve Delete	Edmvendor, Govie	July 02, 2004	DFAS	90909	terry.broderick@eds.com	Yes	Vendor Pay	
Approve Delete	Jones, Steven	July 06, 2004	US Air Force	3456789	steven.p.jones@eds.com	Yes	Vendor Pay	Testing out
Approve Delete	Smith, Doug EDM 2	July 02, 2004	Vendor Pay	555-4321	doyle.smith@eds.com	No	Vendor Pay	Charleston,

Click **Delete**

Delete EDM/EFR Request

Department of Defense
Electronic Document Access

Delete EDM Acccess Request

Document Selection> Account Admin> EDM Request Queue> Delete Confirmation

You are about to DELETE this EDM access request.

- This action will delete the access request from the queue.
- Please notify this user about the deletion of their request.
- Changes to user information are recorded by EDA. You may enter a comment explaining the reason for the deletion of this request:

  Enter Comment (Optional):

- Future requests for EDM documents must be approved by the user's EB POC.

Submit Cancel

Important Info

Enter Comment (optiona

Click **Submit**

Deleting a request DENIES the role establishment in EDA, therefore, the EDM/EFR Documents link will NOT be

Delete EDM Request Complete …

EB POC Authorizes & Requests

To Generate EDM/EFR Requests…

- Log into EDA
- Click Account Administration

Let's Take a Closer LOOK…

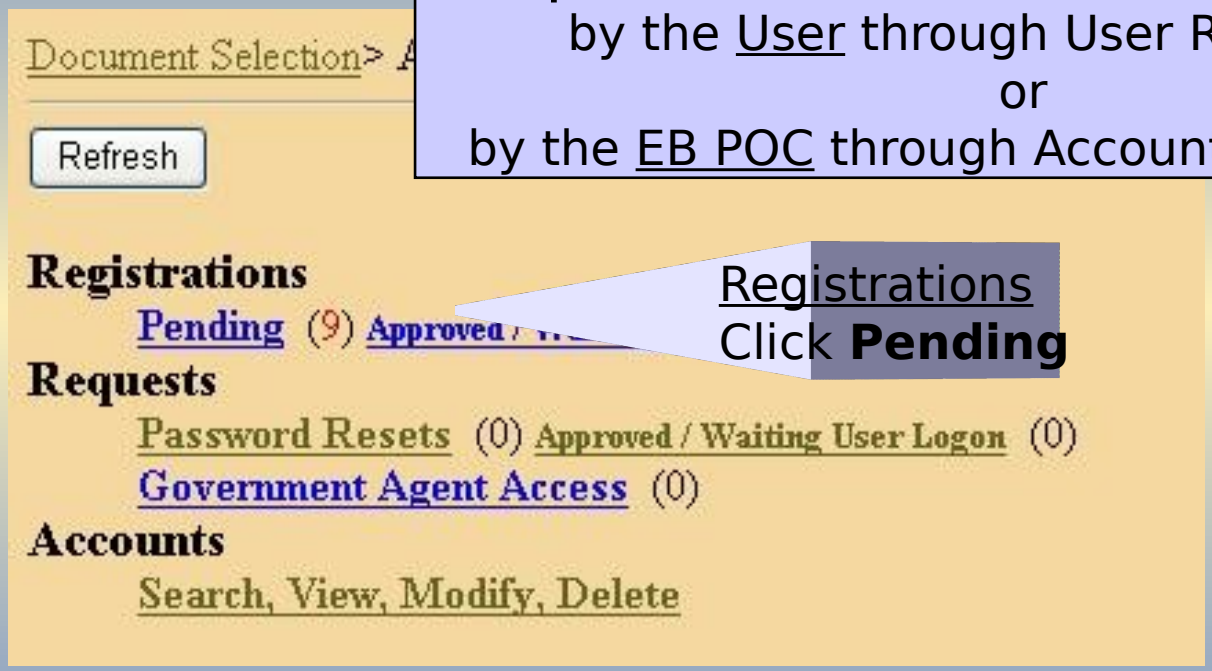
Account Administration Menu

EDM Document Access can be requested

by the User through User Registration

or

by the EB POC through Account Administration



Let's Take a look at Processing a registration …

Processing a Registration

Pending Government/Agent Registrations - DCAA

Document Selection> Account Admin> Pending Government/Agent Registrations - DCAA

Total Registrations: 3

Refresh

Name	Status	Submitted	CSA	Telephone	E-Mail	
Ford, Logan	suspended	Apr 27, 2004	DCAA	888 999 8888	Carol.Flaherty@eds.com	Delete
Ford, Mary	pending	Apr 27, 2004	02701 - Bay States Branch Office	888 999 8888	Carol.Flaherty@eds.com	Delete
Jones, Steve	pending	Mar 31, 2004	Region 2	146171371	steven.p.jones@eds.com	Delete

Refresh

Click **Name"**

Approve registration requesting EDM Access…

Approve Registration

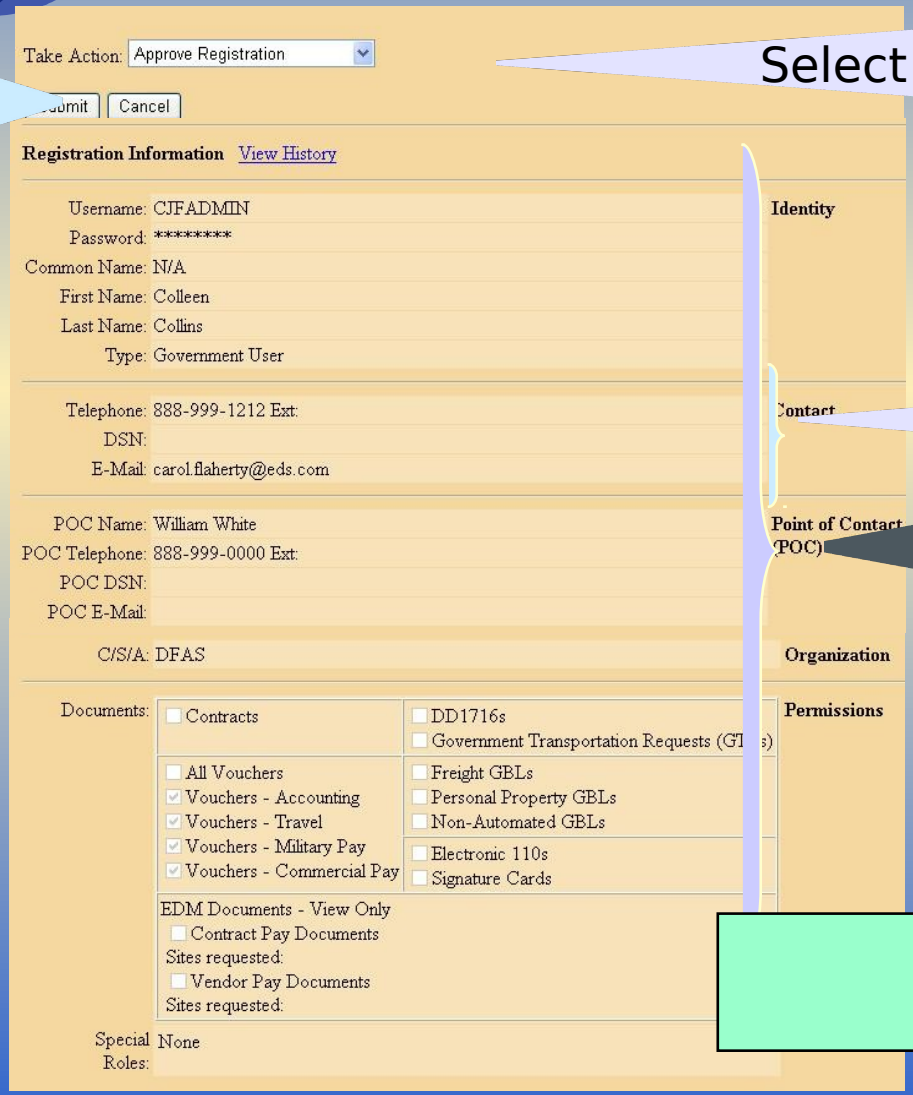
Click **Submit**

Select **Action** – *Approve Registration*

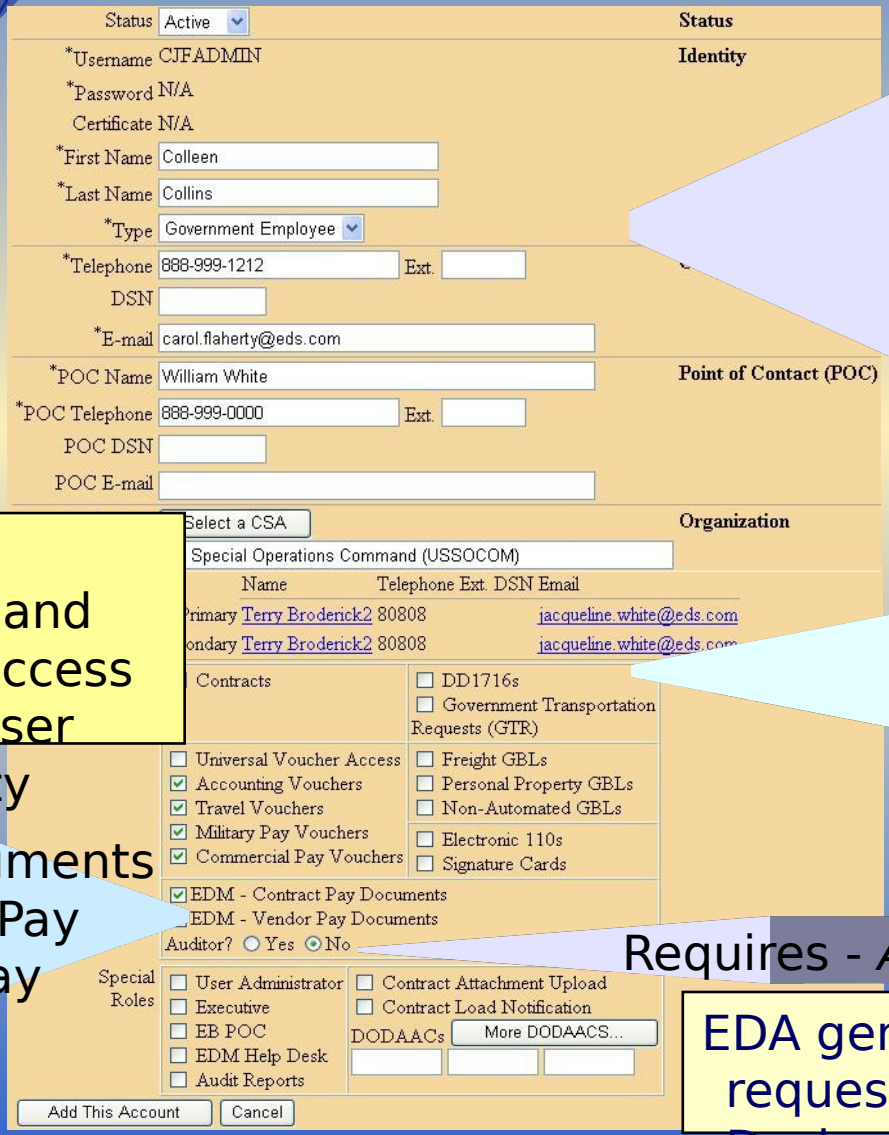
Verify **CONTACT** information

Summary View of Registration Information

Approve Account page is displayed...



Verify/Validate Account



VERFY INFORMATION

Make any necessary changes b
entering new content into fields

Ensure e-mail and telephone ar
Correct and current

EB POCs
authorize and approve access for their user community

Roles & Document Access
Alter (check/uncheck) as required (based on "*Need to Know*")

Definition: *Need-to-Know* – The principle by which users are only granted access to the information, assets, and resources necessary to perform their assigned job functions.

EDM Documents
- Contract Pay
- Vendor Pay

Requires - *Auditor = "**Yes**" or "**No**"*

EDA generates an EDM access request for service by the EDM Help

Approve Account

Select "**Active**"

Status: Active

Identity

*Username: CJFADMIN
*Password: N/A
Certificate: N/A
*First Name: Colleen
*Last Name: Collins
*Type: Government Employee

Contact

*Telephone: 888-999-1212 Ext.
DSN:
*E-mail: carol.flaherty@eds.com

Point of Contact (POC)

*POC Name: William White
*POC Telephone: 888-999-0000 Ext.
POC DSN:
POC E-mail:

Organization

*C/S/A: Select a CSA
US Special Operations Command (USSOCOM)

EB POC

	Name	Telephone Ext.	DSN	Email
Primary	Terry Broderick2	80808		jacqueline.white@eds.com
Secondary	Terry Broderick2	80808		jacqueline.white@eds.com

Permissions

Documents
- ☐ Contracts
- ☐ DD1716s
- ☐ Government Transportation Requests (GTR)
- ☐ Universal Voucher Access
- ☑ Accounting Vouchers
- ☑ Travel Vouchers
- ☑ Military Pay Vouchers
- ☑ Commercial Pay Vouchers
- ☐ Freight GBLs
- ☐ Personal Property GBLs
- ☐ Non-Automated GBLs
- ☐ Electronic 110s
- ☐ Signature Cards
- ☑ EDM - Contract Pay Documents
- ☑ EDM - Vendor Pay Documents

Auditor? ○ Yes ◉ No

Special Roles
- ☐ User Administrator
- ☐ Executive
- ☐ EB POC
- ☐ EDM Help Desk
- ☐ Audit Reports
- ☐ Contract Attachment Upload
- ☐ Contract Load Notification

DODAACs: More DODAACS...

Add This Account | Cancel

Click "**Add This Account**"

Error Messages are displayed if problems with data.

"*" fields are *REQUIRED*

EDA automatically notifies user of approval

Account Maintenance

Requesting EDM Access from Account Administration…

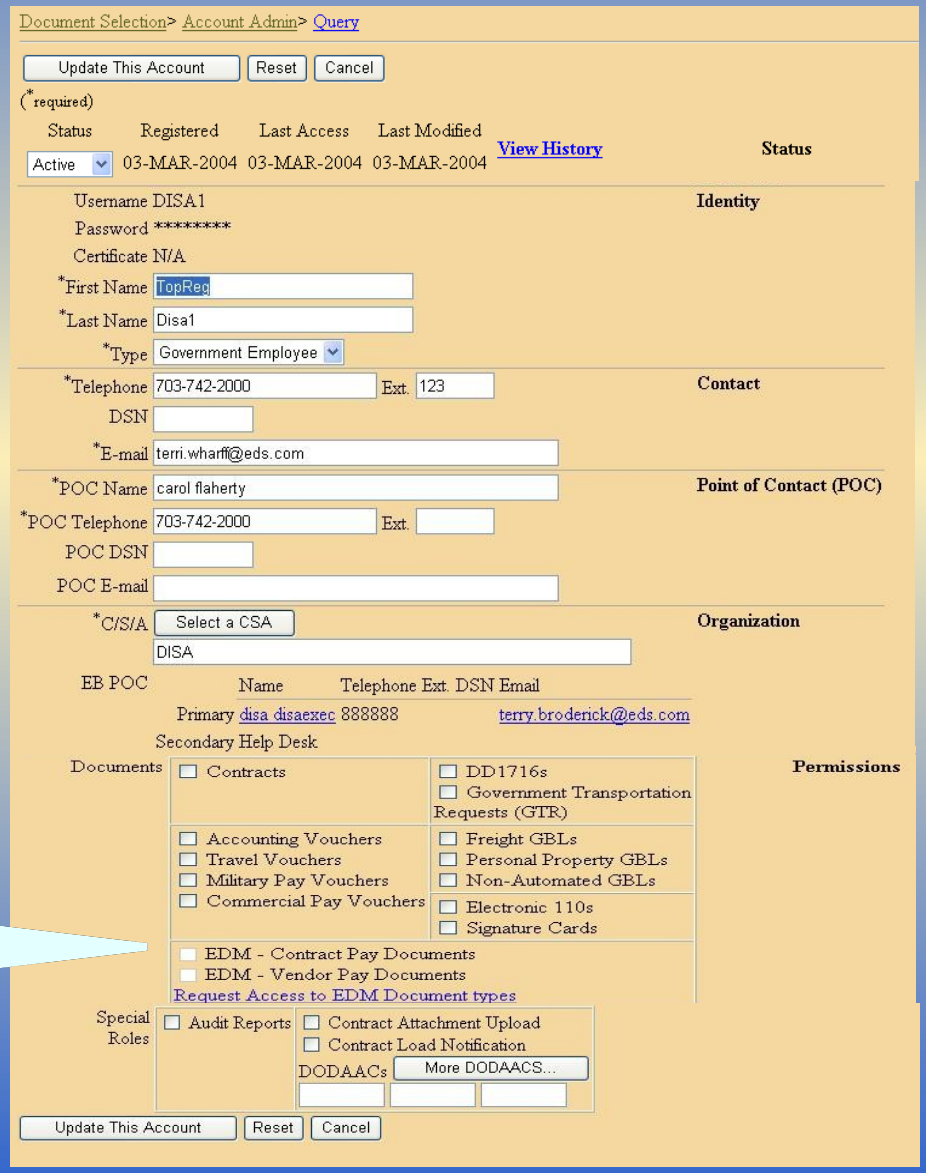
Modify an Account

Request EDM/EFR Document Access

Contract Pay related documents and/or
Vendor Pay related documents.

EB POC **authorizes** user and initiates the access request to EDM/EFR.

EDM Document access
Generate an EDM Access Request



Modify for EDM Access

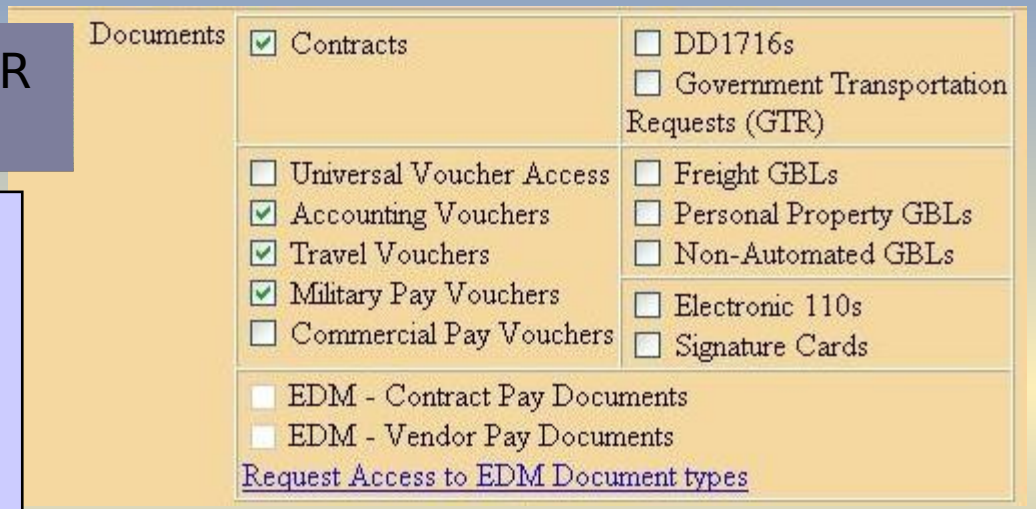
Modify User Account for EDM/EFR Document Access

EDM/EFR is a separate system.

A New EFR username/password is required…THEREFORE, A mechanism to generate an EDM access request is available. The request triggers the EDM/EFR Help Desk to process and distribute new access credentials.

You cannot simply “Check” Contract Pay and/or Vendor Pay roles.

SET-UP in EFR is required prior to accessing Contract Pay and/or

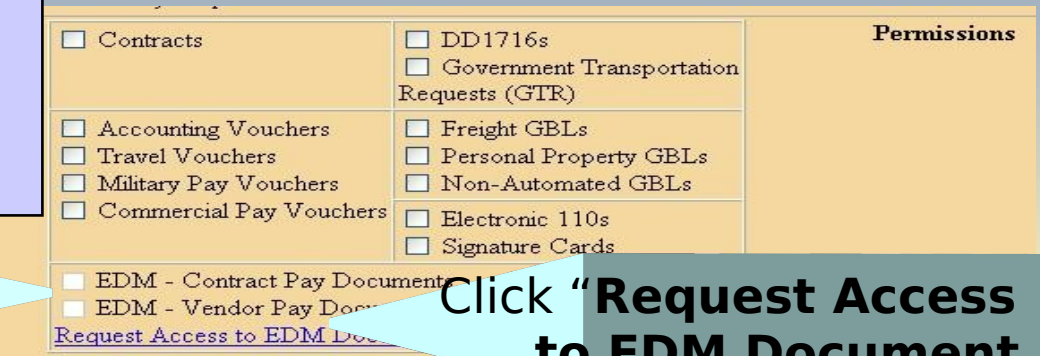


EDM/EFR Help Desk services these additional requests and finalizes the role within EDA.

Processing the request ‘toggles’ the role on in EDA.

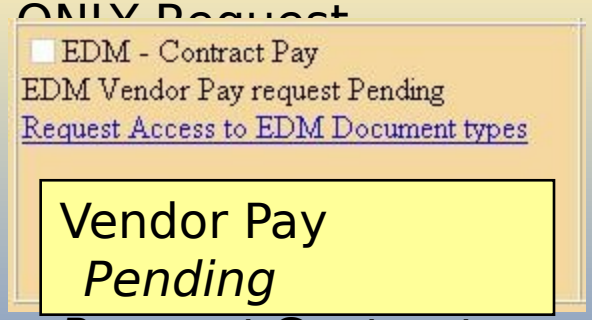
Request/View EDM Access

The EDM Role display on the Modify Screen will vary based on current options and in-progress status of requests

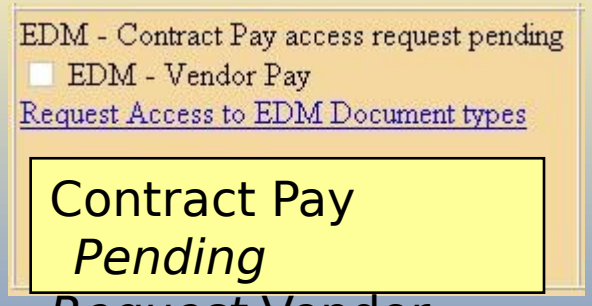


You cannot "Check" the role(s) ONLY Request

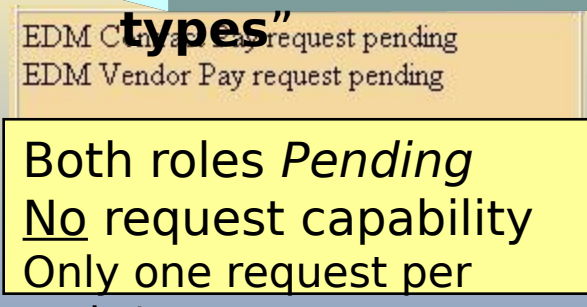
Click "**Request Access to EDM Document types**"



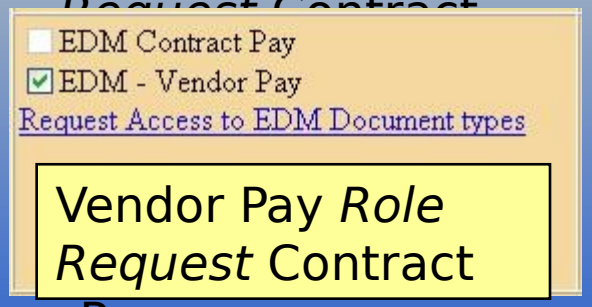
Vendor Pay *Pending* Request Contract



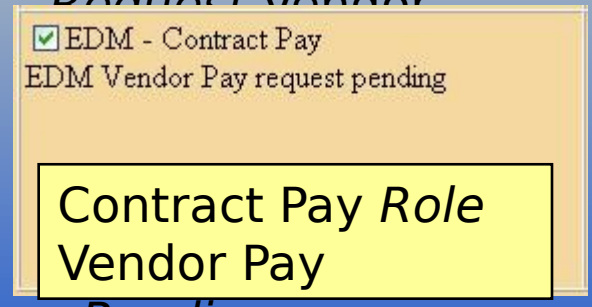
Contract Pay *Pending* Request Vendor



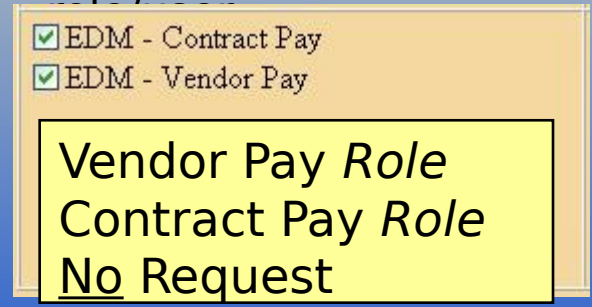
Both roles *Pending*
No request capability
Only one request per



Vendor Pay *Role*
Request Contract Pay



Contract Pay *Role*
Vendor Pay *Pending*

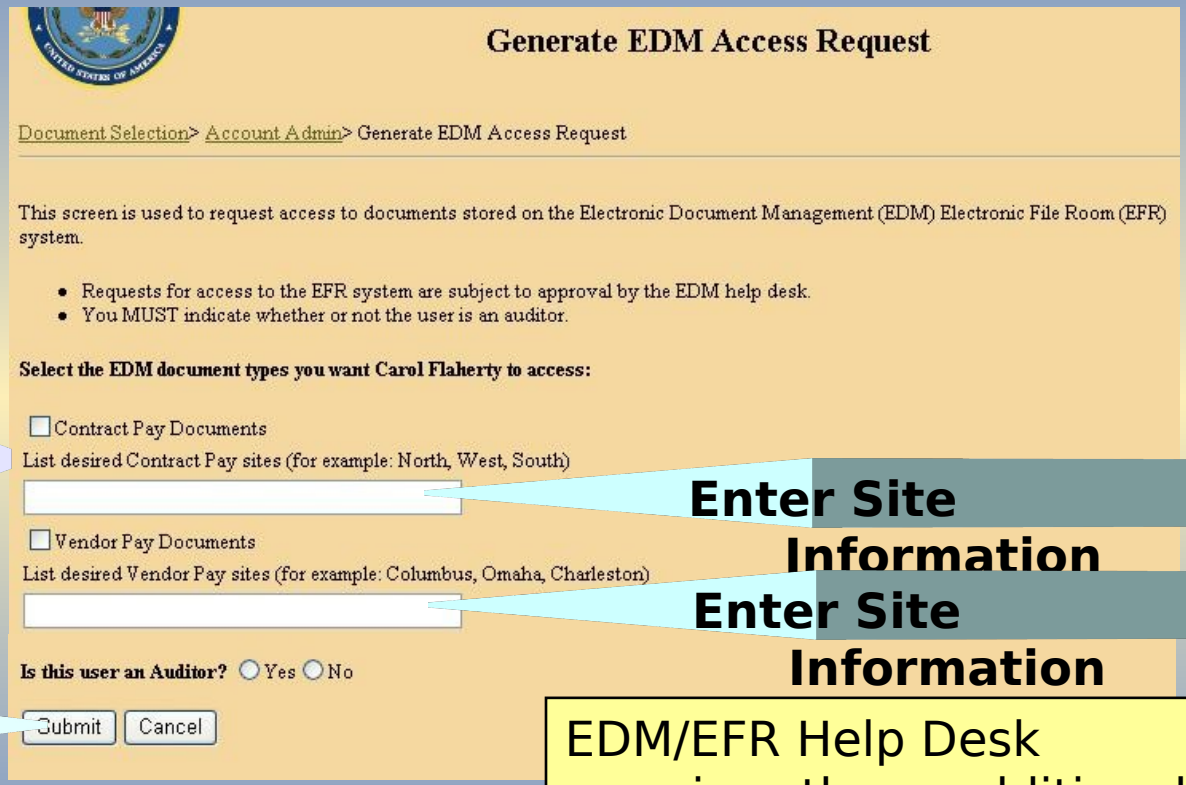


Vendor Pay *Role*
Contract Pay *Role*
No Request capability

Generate Request for EDM Access

Click **Vendor Pay** AND/OR **Contract Pay**

Click **"Submit**


Generate EDM Access Request
Document Selection> Account Admin> Generate EDM Access Request
This screen is used to request access to documents stored on the Electronic Document Management (EDM) Electronic File Room (EFR) system.
Requests for access to the EFR system are subject to approval by the EDM help desk.
You MUST indicate whether or not the user is an auditor.
Select the EDM document types you want Carol Flaherty to access:
Contract Pay Documents
List desired Contract Pay sites (for example: North, West, South)
Vendor Pay Documents
List desired Vendor Pay sites (for example: Columbus, Omaha, Charleston)
Is this user an Auditor? Yes No
Submit
Cancel

Enter Site Information

Enter Site Information

EDA sends notification to the EDM/EFR Help Desk and builds the EDM Access Request for action by the EDM/EFR Help Desk

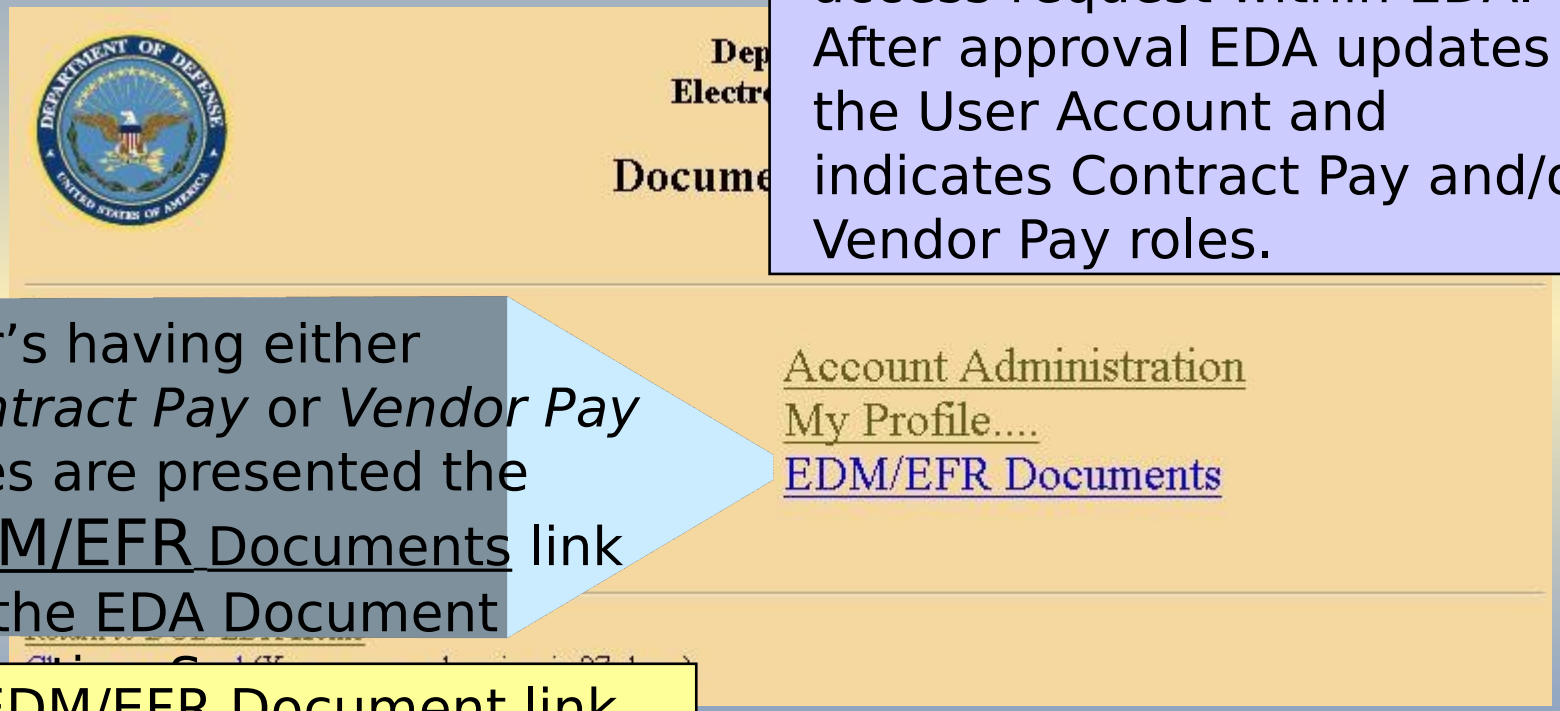
EDM/EFR Help Desk services these additional requests and finalizes the role within EDA.

Site information is used by them in establishing access into EFR

After EFR Set-up, User Sees

EDM/EFR processes the EDM access request within EDA. After approval EDA updates the User Account and indicates Contract Pay and/or Vendor Pay roles.

User's having either *Contract Pay* or *Vendor Pay* roles are presented the EDM/EFR Documents link on the EDA Document



The EDM/EFR Document link REDIRECTS the user to the front page of the EFR system where the user will be prompted for their EFR access credentials

EDA User's Guide

Refer to the EDA Users Guide

- STEP-by-STEP Instructions (for all Users)
- Training Modules

The End